CHAPTER 4 – WRS PREVIOUS SERVICE

400 Introduction

The information appearing on the WRS Previous Service and Benefit Inquiry Extranet site is extracted from WRS participants' employment and benefit history data maintained on ETF's Wisconsin Employee Benefit System (WEBS). The information displayed is updated as a result of changes submitted by current or past employers, ETF, or the participant that may have been entered since you first accessed the participant's account. As a result, a participant's benefit information is not static. Therefore, it is recommended that you print and date a copy of the page for your records. A sample WRS Previous Service and Benefit Inquiry screen appears at the end of this Chapter.

401 Insurance Eligibility

If your newly hired employee is WRS eligible, the employee is also eligible to participate in all ETF administered insurance programs in which you participate. While each insurance program has varying eligibility criteria, most programs require that the employee serve a six-month qualifying period. The insurance eligibility criteria differ depending upon status as a State or Local employee. The Employer Administration Manual specific to each program provides details on the required qualifying period or deferred enrollment requirements.

Detailed information regarding Employer Identification Numbers (EINs); enrollment dates; termination dates; and employment categories for both State and Local employers displays in the Previous Service portion of the screen. A message alerts you to the State and/or Local WRS service the employee has.

Do not apply creditable service when determining that the six-month qualifying period has been met for insurance eligibility determinations.

> Example: If previous service information indicates an employee began WRS participation 3/1/96 and terminated 3/1/05, you may assume the employee performed 9.00 years of creditable service, however, if the employee worked only half-time the total creditable service may be 4.50 years. In this case the employee has satisfied the six month qualifying period.

402   Previous Service Information

Capturing the history of WRS participation is complex and, in some situations, the information that is provided to employers on the WRS Previous Service and Benefit Inquiry screen may not appear complete. Detailed employment information is displayed if WRS service occurred after 1985. Detailed WRS information prior to 1985 was not captured in a manner sufficient to display details. Staff from ETF's Employer Communication Center can provide assistance in those few exceptions where information appears incomplete.

The basis of employment is not captured for WRS purposes and the creditable service may represent full-time, part-time, seasonal, limited term or other bases of employment. The previous service information is listed in terms of employment dates and may not appear to relate to the amount of creditable service for that period of employment.

When an employment category change is processed, the date the participant ceases employment in the present employment category will appear as a termination date. However, because an actual enrollment is not submitted for the new employment category, an Employment Begin/Change Date does not appear. Hence, the creditable service will appear greater than the sum total of the dates of employment.

> Example: Employee participated in WRS from 1/1/97 – 1/1/01, so you may assume the employee would have 4.00 years of creditable service. However, it is now 1/1/05 and 4.00 years of creditable service in employment category 00 appears, as well as 4.00 years of creditable service in employment category 03. In this situation, the employer had submitted an *Employee Transaction Report* (ET-2533) using action code P010, Category Change, with an action date of 1/1/01, which appears as the termination date. However, because action code P010 does not require an actual WRS Enrollment, an Enrollment Date/Change Date does not appear.

Dates in the previous service portion of the application will display, even after the employee receives a WRS benefit. The calculation message for Previous Service will indicate the employee has previous service, even after the employee receives a benefit. Employers must review the Retirement Annuity Information and the Lump Sum (Separation or Retirement) Benefit Information, in addition to the Previous Service information and apply all data to make a correct determination of previous service.

> Example: Employee participated in WRS from 3/1/96-3/1/05 and received a benefit 3/15/05. Those dates continue to display and the calculation message will indicate the employee served six months. However, the Lump Sum (Separation or Retirement) Benefit Information will display the 3/15/05 benefit date. In this example, the employee must serve another six months to be eligible to participate in the insurance programs.

There may be complex situations displayed on the Previous Service and Benefit Inquiry screen. If you have difficulties interpreting the information, or have other questions, please contact the Employer Communication Center at (608) 264-7900 for assistance.

403   Instructions on Determining WRS Previous Service

To determine the previous service status and/or benefit inquiry of an employee:

Key the employee's nine-digit SSN without hyphens or spaces and click
INQUIRE. (999999999):
The following information displays:

- Member's SSN.

- Member's Last name, First name and Middle Initial.

- Member's Birthdate.

- Previous Service, Retirement Annuity Information, Lump Sum (Separation or
  Retirement) Benefit Information, and Creditable Service.

The message "No SSN on file – Verify SSN XXX-XX-XXXX" will display If an
employee was never enrolled in WRS, if you miskeyed the SSN, or if the
employee is covered for WRS the ETF system may not be operational.

404   Explanation of Terms

The following fields appear on the screen and details regarding the information displayed
are explained in the links on the screen:

State or Local Employer Identification Number(s):

The Employer Identification Number(s) display. State employer EINs are seven-digit
numbers beginning with 0001. Example: 0001-110. Local employer EINs are seven-digit
numbers ending with 000. Example: 4391-000. Employer names associated with the
EIN(s) are not displayed.

Employment Category:

The employee's Employment Category is determined by the employer's designated
WRS Agent when the employee's WRS participation begins. The category establishes
the WRS contribution rates required and the annuity benefit available under the WRS.

Following is a list of the potential two-digit Employment Category Codes and their
corresponding descriptions:

00 General (State agencies who report via Central Payroll report general category as 09)
01 Court Reporter (Used by State agencies)
02 State executive retirement plan (Used by State agencies)
03 Protective Occupation Under Social Security
04 Protective Occupation NOT Under Social Security
05 Supreme Court Justice
06 Legislative or State Constitutional Officer
07 Appellate Judge
08 Circuit Court Judge
09 Local Elected Official or Person Appointed to fill an Elected Position
10 Teacher
11 State Teacher Executive Plan (Used only by State agencies)
12 Educational Support Personnel

Enrollment Date/Begin Date Change:

The Enrollment Date is the date the employee began WRS participation with an employer. All Enrollment Dates for an employer are displayed, with the exception of the Begin Date within a new category for the same employer if a Category Change was reported on an *Employee Transaction Report, ET-2533*, using action code P010. If there are multiple employers, enrollment information is listed for each EIN. If the Enrollment Begin Date changed, the revised WRS Begin Date is also displayed.

Termination Date:

The Termination Date is the date a participating employee terminated WRS coverage with a WRS employer. Different types of terminations include a resignation for retirement or other purposes; termination due to a non-work related illness or injury; dismissal or discharge; employee's death; termination due to work related illness or injury; termination of local elected official waiving part-time elected service; and termination as a result of a change in employment category.

Contact the Employer Communication Center if there appears to be a discrepancy between the amount of creditable service indicated and the dates of employment. A termination may also be reported when an employee has been enrolled in WRS in error (e.g. worked less than 30 calendar days).

405   Message

Detailed information will display for either State or Local employers requesting the information; however, the displayed message will vary depending upon employer type, i.e., State or Local. The calculation of the six months and message displayed is not based on creditable service, but rather the dates of WRS participating employment.

The following tables describe the conditions and messages related to previous service.

STATE EMPLOYER	
"Six months state service"	State service is greater than or equal to six months.
"Less than six months state service; local service exists"	State service is less than six months, but greater than zero for local employers.
"No state or local service"	Service is equal to zero for both state and local employers. Employee may have been enrolled in WRS and information will not display until the annual report is submitted.
"No state service; local service exists"	Service is equal to zero for state employer and greater than zero for local employer.
LOCAL EMPLOYER	
"Six months WRS service"	Service is greater than or equal to six months for any employer(s).
"Less than six months local service"	Local service is less than six months, but greater than zero for a local employer.
"No applicable service"	Service is equal to zero for any employer(s). Employee may have been enrolled in WRS and information will not display until the annual report is submitted.

MESSAGES FOR BOTH STATE AND LOCAL EMPLOYERS		
"No SSN on file-Verify SSN XXX-XX-XXXX"	No Social Security Number matches the SSN you entered	Employee does not have previous WRS service or the SSN was entered incorrectly
"Benefit Application, call ETF"	A Retirement or Separation Benefit Application has been received at ETF and is pending, or a Disability Application has been approved.	Call Employer Communication Center at (608) 264-7900 for further instructions
"Death Date on file, call ETF at (608) 264-7900"	A death has been reported for an active employee	Call Employer Communication Center at (608) 264-7900 for further instructions

406   Sample Previous Screen Service

Previous Service/Benefit Inquiry   https://prd2.state.wi.us/servlet/etfinquiry

WRS Retirement System (WRS)

Previous Service and Benefit Inquiry

Employee Social Security: [   ]   (999999999) | Inquire |

Name:

Birthdate:

Previous Service (Dates prior to 1985 do not display)

State	Category	Enrollment Date/Begin Date Change	Termination Date	Local	Category	Enrollment Date/Begin Date Change	Termination Date

Message: No SSN Entered

Retirement Annuity Information

Annuity Benefit Application Received Date:

Annuity Benefit Effective Date:

Lump Sum (Separation or Retirement) Benefit Information

Lump Sum Benefit Application Received Date:

Lump Sum Benefit Effective Date:

Creditable Service

Category	Creditable Service

For more information, contact: Employer Communications Center, or phone (608) 264-7900